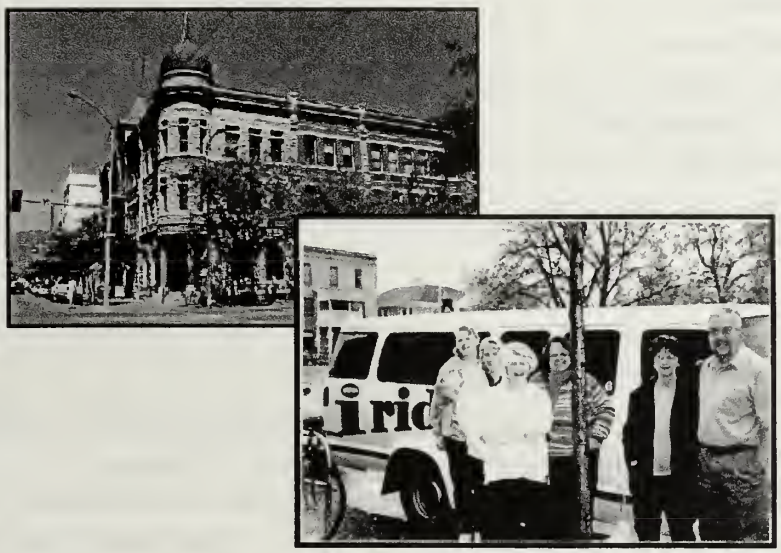
S
388.413212
T6MRT
2003

MONTANA STATE LIBRARY
3 0864 1002 4799 1

MISSOULA-RAVALLI
TRANSPORTATION MANAGEMENT ASSOCIATION

Five Year Strategic Work Plan



nelson\nygaard
consulting associates

In conjunction with Rick Williams

STATE DOCUMENTS COLLECTION
JAN 2 6 2004
MONTANA STATE
1515 E.
HELENA, MONTANA

Nelson\Nygaard Consulting Associates
614 SW 11th Avenue, Suite 400
Portland, Oregon 97205

September 30, 2003

TABLE OF CONTENTS

PAGE

MR TMA History **1**

MR TMA Today **1**

Project Purpose **3**

Five-Year Development Plan Process **3**

Process Overview 3
Context Development 3
Stakeholder Input *3*
Outreach Questionnaire *6*
Board Workshops *7*

The Five-Year Strategic Work Plan **9**

Mission 9
Goals & Priority Statements 9
Objectives & Action Items (Recommendations) 10
GOAL #1: Increase Regional Non-SOV Trips *11*
GOAL #2: Provide Regional Education On Transportation Demand Management *12*
GOAL #3: Create An Organizational Development Strategy *14*
GOAL #4: Create Partnerships To Support MR TMA's Efforts/Missions *16*
GOAL #5: Coordinate And Facilitate Options For Transportation Disadvantaged *17*
Next Steps 18
Timeline 19

Attachment A: Five-Year Work Plan Matrix

Attachment B: Summary of MR TMA Services and Organization

Attachment C: Community Brochure and Questionnaire

Attachment D: Stakeholder Input

Attachment E: Identified Service Gaps

Attachment F: Identified Organizational Issues

Attachment G: 2003-2004 Draft Marketing Plan/Advertising Budget

Five Year Strategic Work Plan

MR TMA History

The Missoula Ravalli Transportation Management Associate (MR TMA) originated from the Environmental Impact Statement (EIS) for the US 93 corridor between Hamilton and Lolo. The Association was established through citizen initiative in the EIS process and as part of the preferred alternative to create a park-and-ride system and to promote SOV trip reduction through alternative measures. The MR TMA's original mission included:

- Organization of rideshare programs;
- Public education programs on traffic (SOV trip) reduction;
- Plan and provide for other traffic reduction measures; and
- Support of other transportation management activities.

Since its inception in 1996 MR TMA has expanded its purpose and programming in Missoula and Ravalli Counties and has extended services to other neighboring areas, including: Lake, Mineral, and Granite Counties. Its original mission of reducing Single Occupancy Vehicle (SOV) trips expanded in the 1990's to include outreach, the development of a transportation management information clearinghouse, and elderly and disabled transportation. In 1997, the MR TMA Board also decided to become a vanpool operator, rather than act as strict management agency. Originally providing service only in the Bitterroot Valley, the vanpool program has expanded to other corridors and remains the best known and used service provided by MR TMA.

MR TMA Today

Today, MR TMA provides a range of services to residents of Missoula, Ravalli and Lake, Mineral and Granite Counties. MR TMA is governed by a Board of Directors comprised largely of staff from public agencies in Missoula and Ravalli Counties; its membership also includes citizen and business representatives. MR TMA does not solicit private business membership and supports its operations largely from CMAQ funding allocated through the Montana Department of Transportation (MDT).

Figure 1 provides a brief summary of current MR TMA program activities:

Figure 1 MR TMA Services

Service	Description
Ride Sharing (Ridematching)	MR TMA administers a ride-matching program designed to link residents of Missoula from Missoula, Ravalli and Lake Counties commuting to Missoula. MR TMA staff is also available to work with employers to establish on-site employee trip coordinators.
Vanpools	5 vanpools currently operate on the US 93 corridor south of Missoula; stopping at designated Park & Ride sites inbound to Missoula. 1 Vanpool operates on I-90 West from Alberton to Missoula 1 reverse commute vanpool operates from Missoula to Hamilton
Community Needs Van Service (CNVS)	Provides rides to Seniors and persons with disabilities in the Missoula urban area to medical appointments, shopping and recreational activities.
Park and Ride	MR TMA coordinates designated Park & Ride areas for vanpool participants and carpoolers along the Highway 93 corridor, as well as other major commute corridors.
Guaranteed Ride Home	MR TMA provides guaranteed ride home through a contract with Yellow Cab for all registered carpool and vanpool participants, Griz Card holders, Mountain Line monthly pass holders, 11 ride punch cards and EZ pass holders.
School Outreach	MR TMA provides educational outreach to elementary, middle and high school students. Programs are designed to educate Missoula, Ravalli and Lake County students about Transportation Demand Management and viable alternatives to single occupancy vehicle commuting.
Specialized Transportation Coordination	MR TMA partners with Missoula Specialized Transportation Advisory Committee and Lake and Ravalli County TACs to coordinate resources, to create more transportation options and to develop more cost effective services for seniors and persons with disabilities.

Amidst a diverse range of services, vanpool provision and park-&-ride development remain the backbone of the organization. Started in 2001, the Community Needs Van Service (CNVS) has drawn a dedicated ridership base and demand for the service appears to be growing. MR TMA has also taken an important role in coordinating transportation services for seniors and persons with disabilities through their participation in the Missoula Specialized Transportation Advisory Committee and Lake and Ravalli County TACs.

In all, MR TMA remains true to its original mission to help the citizens of Missoula and Ravalli Counties make better, more informed transportation choices.

Project Purpose

This report is the second of two deliverables in the Missoula Ravalli Transportation Management Association (MR TMA) Five-Year Development Plan (2003-2008) process. Funded by the Montana Department of Transportation, the Five-Year Plan process give Montana public transportation providers an opportunity to review existing services and programs against transportation needs in the local service area. MR TMA has expanded its organizational mission and goals significantly over the last several years and currently provides a unique mix of commuter vanpools, senior and disabled transportation, ride matching and Transportation Demand Management (TDM) advocacy services. A key goal of the Five-Year Plan will be to evaluate the TMA's current program activities against board adopted directives and available funding sources.

Technical Memorandum #1: Existing Conditions provided detailed information about MR TMA operations, governance, and organization as well as input from the general public and key stakeholders.

Five-Year Development Plan Process

Process Overview

The key focus of this study is to define an organization mission, vision and goal set to guide MR TMA programming and organizational development over the next five-years. In recent years, significant turnover on the Board of Directors and leadership changes within the TMA have led many to question the purpose and direction of the organization. This process has provided an opportunity for the MR TMA Board to evaluate and refine their organizational mission and goals. Finally, the Strategic Work Plan sets a clear and measurable path to guide organization programming and Board and staff work requirements for the next five-years.

Context Development

The first three months of the Five-Year Development Plan process focused on outreach, review of materials, and data collection and analysis. The result of this process was a detailed Technical Memorandum describing existing conditions. The document included:

Stakeholder Input

Nelson\Nygaard conducted a number of interviews with stakeholders throughout the MR TMA service area. Stakeholders representing a diverse range of agencies and constituent groups were asked questions addressing topics such as:

- Importance of MR TMA services;
- Coordination of services with other providers/agencies;
- Effectiveness of current organizational structure;
- Unmet commuter vanpool/transportation needs;

- MR TMA's role in providing community outreach;
- Effectiveness of MR TMA outreach efforts; and
- Other input they had about MR TMA organization, operations or funding.

Overall, stakeholders were supportive of TMA activities and felt that the agency played an important role in local and regional transportation provision and policy-making arenas. It is important to keep in mind that the following are shared opinions from key community leaders, but do not represent the results of quantifiable technical analysis. While these opinions may be divergent from those of MR TMA and its Board of Directors, they provide an important gauge of how the community views the organization and its services.

We have separated comments into four major categories summarizing key themes that emerged from stakeholder interviews:[1]

1. Existing customers are very satisfied.

- Vanpool riders and major employers are very supportive of MR TMA vanpool service. Almost unequivocally, stakeholders thought that this program was not yet meeting its potential, in terms of riders carried. Although many stakeholders were aware of the financial constraints to expanding vanpool programs, they largely felt that better public information and visibility would attract more vanpool riders.
- CNVS riders and senior service representatives like the flexibility and personal customer service provided by this program. Since Mountain Line paratransit service uses a call back reservation system, some paratransit eligible riders have switched to CNVS because they are able to speak directly with a person when booking trips. Several stakeholders felt that CNVS was an important service for seniors who are not eligible for comparable paratransit service, but have physical disabilities that make it difficult for them to access fixed-route bus service.
- Concern that MR TMA may not be meeting needs of potential/interested customers. While existing MR TMA customers praised services highly, some stakeholders conveyed the experience that potential vanpool and carpool customer inquiries or requests for information are not always met. Specifically, stakeholders referred to instances where MR TMA had not returned calls or been unable to accommodate interested vanpool riders. This may be due to the fact that at times there is very limited capacity to initiate new vanpools or meet specific commuter service requests.

2. Vanpools, vanpools, vanpools.

- Perceived core mission is reducing vehicle miles traveled through commuter vanpools, park & ride, and carpools (intercity trips). Stakeholders saw the promotion of vanpooling as the most important service goal for MR TMA. The

[1] It is important to note that we only discuss issues or comments that were raised by several stakeholders (at least three) and/or reflect the opinions of a larger customer/constituent groups. Although this is not a scientific evaluation, individual opinions can vary significantly and not accounted for unless supported by other stakeholder groups.

development of park & rides in support of vanpool activities was also identified as a high priority goal.

- Other TMA programs should not come at the expense of meeting regional vanpool (commuter) needs. Several stakeholders felt that the diversification of MR TMA programs has come at the expense of the organization's key missions to reduce vehicle miles traveled through commuter vanpool and carpool programs. At least one stakeholder felt that MR TMA should focus its efforts on assisting commuters in establishing private vanpools and carpools rather than acting as a service provider.
- More, larger, more efficient vanpools. Stakeholders that we interviewed, including several large employers, feel that there is a significant unmet demand for vanpool service, especially in the Highway 93 Corridor.
- Primary geographical focus should be the Highway 93 corridor (north & south).

3. MR TMA needs to define and support a clear and directive mission.

- Need for more focused mission (stretched too thin). MR TMA's numerous programs and its recent entry into senior and disabled service provision have left many local stakeholders feeling confused about what MR TMA's core mission and purpose is.
- Need to eliminate dual-directorship and create a single Executive Director position. A number of stakeholders indicated that there was confusion among their organization and others about who was in charge at MR TMA. Many felt that it was a mistake going to a dual-director structure during a time when the TMA needs strong leadership to promote its internal programs as well as a regional TDM agenda.
- Operating too many programs, some of which don't relate to original organizational mission. Many stakeholders indicated that they felt the TMA would benefit from refocusing its efforts on a smaller number of programs focused around a defined core mission.
- Redundancy in services (CNVS & MIM). Several stakeholders felt that MR TMA services overlapped with either other Missoula area senior and disabled services or outreach service provided by Missoula-In-Motion. While this may be a misperception (CNVS service is designed to fill gaps in Missoula area senior and disabled transportation services and MR TMA coordinates with Missoula-In-Motion to prevent program overlap), it appears to be a common one. It is important to make apparent the difference in the mission and programs operated by Missoula – In-Motion and MR TMA (they may be obvious internally, but is not always externally).
- Several stakeholders felt that school outreach should not be a goal for MR TMA, as it does not contribute directly to intercity commuter trip reduction. Stakeholders did not question the importance of school outreach/education, simply whether it fell within MR TMA's defined mission.

4. **MR TMA needs to define whom its target groups are and diversify local funding base to meet the identified needs of those groups.**

   - MR TMA needs a more diverse and sustainable funding base. Numerous stakeholders indicated that the development of new and on-going funding sources should be a key priority for MR TMA Board of Directors.
   - Need to clearly define membership (who do we represent?) and seek local funding. Several stakeholders indicated that they thought the TMA should be working to gain the support of the local business community and increasing funding for employer-specific vanpool programs through business membership.
   - MR TMA should focus on providing alternatives for intercity trips in Missoula, Ravalli and Lake counties. A number of stakeholder felt that the TMA should be focused on reducing vehicle miles traveled for intercity trips to and from Missoula.
   - Any overlap in programs threatens funding. At least one stakeholder indicated that they were concerned about CNVS competing for local funding that has traditionally gone to other senior and/or disabled service providers.

Outreach Questionnaire

As a cooperative effort, MR TMA and Nelson\Nygaard developed an informational brochure combined with a short community transportation needs survey. The brochure/questionnaires were distributed throughout the community at key locations including:

- Major employment sites, including current vanpool destinations;
- High traffic businesses where general public have a chance to view/respond;
- On MR TMA vans, on Mountain Line buses and in the downtown transit center;
- City Hall, Missoula In Motion, University Transportation Office and other public transportation offices;
- Senior Centers and social service offices; and
- Other key sites frequented by local residents.

The coordinated brochure/newsletter provided MR TMA an excellent opportunity to distribute information about its services and to reach members of the public not familiar with its programs. At the same time it allowed interested residents to provide input on personal and perceived community transportation needs and issues.

Incorporated in the information brochure was a brief community transportation needs survey. The survey was not designed to collect highly detailed information about multimodal transportation needs, but rather was designed to gauge current use of and interest in MR TMA services. Since the questionnaire was integrated in a brochure about

MR TMA services, the survey was designed to poll residents who have some interest in the service provided by the TMA.

Key findings from the survey include:

- Over 50 percent of respondents indicated that alternative transportation services provided by MR TMA and Mountain Line were not important to them personally. However, almost 75 percent of respondents felt that these services were very important to the community.

- When asked about a number of service characteristics that influence their decision to use MR TMA services, respondents were most likely to be sensitive to the availability of program information (both in prints and on the web), the limited timing of vanpool trips and the limited routes on which vanpools operate.

- Over 95 percent of respondents indicated that they supported the promotion of alternative modes, while just 36 percent use alternative modes on a regular basis. A significant 30 percent indicated that they would use an alternative to the SOV if there was one available that better met their needs.

- Respondents were asked to indicate their thoughts about the most pressing transportation needs in Missoula and Ravalli Counties. Twenty-seven respondents indicated that there was a need for better/increased/less expensive motorized alternative transportation; 11 of these respondents specifically indicated the Hwy. 93 Corridor through the Bitterroot Valley. Non-motorized alternative and fuel-efficiency/air pollution were also identified as major issues.

Board Workshops

The backbone of the Five-Year Development Plan process is two intensive workshops held with the MR TMA Board of Directors to establish the Five-Year Strategic Work Plan:

1. The first workshop was held on April 24th and 25th, 2003 in Missoula. At this meeting the consultant team worked with Board members and MR TMA staff to refine the organization mission and to establish and prioritize broad policy goals that will guide programming and organizational development over the next 5 years.

2. A second Board workshop was held in Missoula during July 2003. The intent of this meeting was to revisit broader policy goals developed in April and detail action items and subtasks required to complete these goals. Several major action items arose from the July meeting. Discussed in more detail in the following section, these are:

    a. Develop a Marketing Plan;

    b. Lead effort to consolidate Rideshare Matching Services in region;

c. Hold outreach meetings with key governmental agencies, employers and strategic partners;

d. Set baselines to track program success; and

e. Continue board development for next six months, then begin recruitment of three new members from strategic partners.

The Five-Year Strategic Work Plan

The MR TMA Strategic Work Plan is composed of four core elements

Mission

Goals & Priorities Statements

Objectives

Action Items

Mission

During an intensive 2-day workshop in April of 2003, the MR TMA Board of Directors drafted and later adopted a new organizational mission. The new mission reflects the values and direction of the Board and organization and sets a tone for it's programming over the next five years. The MR TMA mission is:

> *To create a more livable region, MR TMA promotes the availability of transportation options to effect reduced use of the single occupancy vehicle. To accomplish this, MR MTA will provide ridesharing programs, ride matching and scheduling services and coordination of park & ride facilities.*
>
> *MR TMA will also work with its public and private sector partners to serve as a convenient clearinghouse for information on other transportation choices.*

Goals & Priorities Statements

Based on the Mission Statement presented above, the MR TMA Board of Directors developed a revised set of organizational goals. This work was completed in an interactive workshop in May 2003. To ensure that the intent of each goal is carried through, the board identified priority statements that provide more specific direction for achieving each stated goal. While not as specific as objectives or action items, these statements prevent goal statements from being too vague or indeterminably broad.

The **goals** define the "must dos" based on internal and external drivers. "Where must we focus?"

The **priority statements** define success and provide direction for the next three to five years. "What do we need to achieve to meet our goals?"

The objectives and action items to achieve these goals are described in the following section and are also illustrated in matrix format in Attachment A.

GOAL #1: Increase Regional Non-SOV Trips

- Identify Options and Modes
- Develop Baseline for Program Monitoring

GOAL #2: Provide Regional Education On Transportation Demand Management

- Identify Groups to Target through Outreach
- Set Goals for the Number of Outreach Meetings with Each Identified Target
- Make TDM Resources Available via the Web and Informational Clearinghouse

GOAL #3: Create An Organizational Development Strategy

- Host Board Retreat to Develop Funding and Advocacy Agenda
- Develop Committee Structure and Work Plans
- Reorganize TMA Staffing

GOAL #4: Create Partnerships To Support MR TMA's Efforts/Missions

- Identify, Categorize and Recruit Strategic Partners

GOAL #5: Coordinate And Facilitate Options For Transportation Disadvantaged

- Define Program Limitations and Set Funding Goals/Restrictions

Objectives & Action Items (Recommendations

In July of 2003, the MR TMA Board of Directors convened for a second interactive workshop with the goal of further refining the organization's Action Plan. Based on the mission and broad policy goals developed in April, the Board worked with staff and consultants to define realistic objectives and action items.

The **objectives** are understandable, specific attainable and program-oriented statements supported by a series specific action items.

The following sections describe MR TMA objectives and related action items. Each action item is part of plan recommendations to achieve the Mission and Objectives identified by the MR TMA Board of Directors. A more detailed matrix including related costs, implementation responsibilities and achievement benchmarks is included in Attachment A. This matrix will be used by MR TMA as a guide and timeline for implementing plan recommendations.

GOAL #1: Increase Regional Non-SOV Trips

Objective A. Identify Options and Modes

> The **action items** are doable tasks (single or multi-step) that must be achieved to satisfy program objectives. "What actions should we be taking?, "when?" and "how much do they cost?"

Action 1. **Develop MR TMA Marketing Plan.** As of August 2003, MR TMA had already developed a Draft Marketing Plan. A copy of the draft plan is available in Attachment G. The plan outlines strategies for promoting service through newspaper, cable, local television, radio, Internet and other marketing media. In concert with marketing plan deployment, MR TMA should begin to consider the marketability of specific programs and develop program level branding concepts that will allow area residents to easily identify vanpool or CNVS services.

Action 2. **Explore Consolidation of Rideshare/ Ridematching Programs**. The MR TMA Ridematching program has not achieved the success of its vanpool programs. In part, because many of the areas largest employers run their own internal ridematching services. MR TMA staff will meet with other agencies providing ridematch services to determine whether there is consensus on the need to create a single consolidated ridematching service. If feasible, MR TMA will take the lead in developing an action plan for developing and managing a regional ridematching database and website.

Objective B. Develop Baseline for Program Monitoring

Accountability to funding agencies and the community at large requires MR TMA to provide clear technical data about the impact of its programs. The action items under Objective B area designed to provide baseline data from which to set program achievement targets and monitoring benchmarks.

Action 1. **Develop Baseline Reporting and Set Targets.** This item will require close coordination with other local and regional agencies, including: Missoula County, the City of Missoula, Missoula-in-Motion and others. In coordination with these agencies, MR TMA will develop a comprehensive list of existing regional trip and modal data (including schedules for any regular updates) to act as a baseline for vanpool, ridershare and Community Needs Van Service.

Action 2. **Assess Achievement and Redefine Targets.** The MR TMA Work Plan then calls for the development of measurable targets for all MR TMA programs tied to baseline performance report. For example, vanpool program targets may include those for: number of vanpools, total

annual ridership (one-way trips), vehicle miles reduced, safety, and emissions reduction.

Objective C. Grow Vanpool Program as Demand Merits

One of the key objectives in meeting this goal will be to increase the number of commuters in the MR TMA service area who choose to commute by vanpool. Two action items support this goal:

Action 1. **Attract new riders through focused marketing.** Increase vanpool ridership should be a key focus for MR TMA. Marketing plan activities identified in Objective A should largely be focused on attracting new riders to this MR TMA vanpools. Growth in the vanpool program of one net new van per year provides an aggressive goal for increasing non-SOV commute trips in the region.

Action 2. **Provide new, safe, reliable vanpool fleet.** MR TMA should continue to update its vanpool fleet regularly to ensure that vehicles are clean, safe and attractive. This is very important, since public and customer perception of MR TMA and I-Ride service is reliant on the look and quality of its vehicles.

MR TMA's current fleet consists of nine 2002 vans with a useful lifespan of five years or 100,000 miles. MR TMA has earmark funds set aside for the purchase of three vanpool vehicles, to be purchased in late 2004. The TMA should plan to purchase two additional replacement vehicles each year from 2005 to 2007. Existing vans with useable life remaining can then be held and transferred to newly developed routes, including urban or shorter intercity routes. If at any time the TMA holds more than four excess vans, it should consider sale of the oldest spare vehicles.

GOAL #2: Provide Regional Education On Transportation Demand Management

Objective A. Target Groups for Outreach and Set Goals

Action 1. **Create prioritized outreach plan (*Complete*).** In June 2003, MR TMA held a work session with the Board of Directors & MR TMA staff to identify top candidate groups for outreach. These groups include: the top 10 major area employers, the University of Montana, and service area county governments as well as Chambers of Commerce. Candidate groups were then prioritized by importance.

Objective B. Conduct Ongoing Outreach to Key Groups in Region

Action 1. **Develop Defining Message and Communication Materials.** This item calls for the development of presentation and collateral materials for

educational presentation on TDM & MR TMA services. A key result will be an informational presentation that MR TMA staff can use in speaker's bureau type presentations with potential partners. Collateral materials prominently displaying the MR TMA logo should also be developed along with a distribution strategy.

Action 2. **Coordinate With Missoula-In-Motion (MIM).** A major obstacle to the success of the MR TMA, identified repeatedly during stakeholder outreach efforts for this plan, is the confusion between MR TMA and Missoula-In-Motion missions and program goals. Through this action MR TMA will coordinate with MIM staff to clearly define the separation between their programming goal and make joint presentation to key common partners and community leaders. The successful achievement of this action item will require agreement and participation of MIM staff.

Action 3. **Hold Meetings with Key Outreach Groups (identified in Objective A)**. MR TMA Board Members and a staff person will jointly hold meetings with at least the following groups (1) City of Missoula, (2) Top 10 Regional Employers, (3) University of Montana/ASUM, & (4) Counties of Missoula, Ravalli, Lake, Mineral, Granite. The purpose of these meetings will be to provide potential partners information about MR TMA service and encourage them to participate or fund MR TMA activities.

Objective C. Improve/Add Office Space and Develop TDM Clearinghouse Resources

Action 1. **Research Office Space Availability/Funding and Move (Partially Completed).** Preliminary design and environmental review is complete for the construction of a new office and operations facility at Dornblaser Field. The new facility will include office and garage space for MR TMA staff and vehicles. The building will also provide a waiting lobby for Park-&-Ride activities at the Dornblaser site. Construction of the new facility and additional Park-&-Ride capacity is expected to be complete as early as Fall 2004.

Action 2. **Develop TDM Store, Information Clearinghouse and Resource Center.** The new MR TMA operations facility will include space for a planned TDM Store, information Clearinghouse and Resource Center. The specifics of the store are currently being planned. It will be designed primarily to provide a single point of access for all sources of regional TDM and transit information, to be a point of sale for transit and alternative modes transportation passes and to sell transportation related items. MR TMA may want to consider working with local vendors to provide unique saleable items. For example, the Lloyd District TMA in Portland, Oregon has a similar

transportation store where it sells local artwork and household items constructed of bicycle parts.

Objective D. Upgrade MR TMA Website

Action 1. **Evaluate Grant Sources to Fund Website Development (*Complete*).** MR TMA has received funding from the Montana Department of Transportation through the RTAP program to fund web site improvements.

Action 2. **Design New Website.** MR TMA's contract web designer will be instructed to develop and integrate MR TMA marketing materials in a new and more functional website design. It is crucial that the website mirrors the most current program logos (e.i., I-Ride) and MR TMA collateral materials. The website should also provide links with strategic partners and be set up to interface with any integrated ridematching products that might develop from Objective B. The ultimate vision is a single interactive web page for regional ridematching that includes on-line search and matching capabilities. Several good examples of this type of service exist around the nation, including the Puget Sound region's www.rideshareonline.com.

Action 3. **Launch & Maintain New Website.** Once website design is complete, the MR TMA will need to retain hosting and maintenance service to ensure that the new website is functionally reliable and any maintenance issues can be addressed immediately.

GOAL #3: Create An Organizational Development Strategy

Objective A. Host Board Retreat to Develop Funding and Advocacy Agenda

Action 1. **Plan, organize and host Board of Directors retreat.** The MR TMA Board of Directors will attend an annual Board Retreat hosted by MR TMA staff. The retreat will be facilitated by an outside party to allow staff to participate and to provide mediation on difficult issues. As a rolling plan, this document and corresponding action plan matrix will be update annually at this retreat. Each year the board will review achievements of the past year, discuss new and ongoing action plan items and outline new action items for the following year.

Action 2. **Develop Funding and Advocacy Agenda.** Based on identified programming, outreach and advocacy agenda items identified during the Board Retreat, staff will revise the MR TMA Strategic Work Plan (action plan). Staff will present the revised Strategic Work Plan (action plan) to the Board for approval one month after the board retreat.

Objective B. Develop Committee Structure to Support and Further Advocacy of MR TMA Programs.

Action 1. **Evaluate Need for Program Specific Committees**. The MR TMA Board of Directors has determined that there is no short-term need to develop a committee structure to support program activities. However, the Board supports the development of a committee structure to help guide long-term programming and organizational development.

Action 2. **Develop Committee Structure to Support MR TMA Programs.** The MR TMA Board of Directors will conduct an annual review of committee needs. When it is determined that one or more committee is required to support specific TMA program needs, TMA staff will: (1) identify potential committee members, (2) develop a committee member recruitment plan and timeline, (3) develop a committee work plan, and (4) recruit committee members. An effective committee structure will include a clear and concise mission statement and action plan. A staff member should be assigned to support each committee and at least one Board representative should be involved in committee activities.

Objective C. Reorganize MR TMA Staffing

Action 1. **Reorganize MR TMA Staffing to Improve Efficiency and Establish Accountable Leadership Role**. Under this item the Board of Directors would consider and approve a reorganization of MR TMA's current dual-director management. Many local and regional stakeholders that we spoke with as part of this process felt that the TMA's dual-directorship weakened the organization. A frequent comment was that the TMA needs a single, effective Executive Director that would provide leadership for the organization and accountability in the eyes of partners, potential funding sources and the state legislature. Given the small size of the organization, we recommend a single Executive Director position be formed. This position would be responsible for the management of organizational business, finance, advocacy and oversight of program managers assigned to specific MR TMA programs.

High priority action item!

Objective D. Review, Adopt and Implement Strategic Work Plan

Action 1. **Board Review of Strategic Work Plan**. This is a rolling Five-Year Strategic Work Plan, meaning it is designed for annual review and update. The MR TMA Board should conduct a facilitated annual review of its operations (Annual Board Retreat) leading to revised

objectives and action items for the following year. The annual review and update should address (1) program operations and performance, (2) organizational structure and funding, (2) governance and leadership.

Action 2. **Implement Strategic Work Plan Action Items**. Revised objectives and action items will be laid out in a Strategic Work Plan matrix similar to that provided in this report and considered for adoption following the Annual Board Retreat. Action items will be implemented by Board and/or staff according the Strategic Work Plan.

GOAL #4: Create Partnerships To Support MR TMA's Efforts/Missions

Objective A. Develop MR TMA Board of Directors through Strategic Partnerships

Action 1. **Maintain Board composition and develop group dynamics**. During the April 2003 Board Workshop, members identified the need to expand the MR TMA Board of Directors by representatives of key partner agencies to join. A decision was made by the board to postpone active recruitment until February 2004 to provide existing Board members an opportunity to develop its group dynamics. As a relatively young Board, the group recognized the need to improve communication and problem solving dynamics before inviting new membership.

Action 2. **Begin Active Recruitment of New Board Members**. Beginning in February 2004, MR TMA will recruit one new Board members from each of the following two areas: (1) Development/Building Industry Representative (2) Hospitals/Medical Representative. More immediately, the organization will seek an attorney representative who will act as an organizational and support resource.

Action 3. **Review Need for Representation of Other Partner Organizations on MR TMA Board**. The MR TMA will conduct a bi-annual review of partnership needs and opportunities. The Board will decide to recruit new members as needed to improve community understanding of MR TMA Mission & Goals up to maximum of 15 members.

Objective B. Identify and Recruit Partners

Action 1. **Identify Key Strategic Partners in MR TMA Service Area**. Following the April 2003 Workshop, the Board of Directors discussed and identified a list of regional partner agencies able to assist MR TMA politically, fiscally, or through other advocacy efforts. This list (shown in Attachment A) is still relatively long and should be prioritized.

Action 2. **Meet Individually with Partners to Share MR TMA Mission & Goals**. Before MR TMA staff and Board members begin to meet with partner organizations it is important to have a clear and resonant message. Board and staff will identify the top three service, organizational and/or funding goals they expect to achieve through regional partnerships and develop a concise goal statement for each. Beginning in January 2004, MR TMA will arrange meetings with leaders from each partner organization to discuss these goals and potential for reciprocal support. A Board and staff member should attend each meeting.

Objective C. Hold Partner Event to Educate Partners About TMA and Promote Buy-In

Action 1. **Invite identified MR TMA partner representatives to 1st MR TMA partner event**. The MR TMA Board of directors identified the need to host an annual partner event to promote TMA programs to key community partners and increase their understanding of MR TMA Mission and Goals. The organization plans to host its first annual Partner Event as part of a Ribbon Cutting Ceremony for new Dornblaser operations and administrative facility. This event will be held during the late summer or fall of 2004.

Action 2. **Develop and Host Annual Partner Event**. Each year MR TMA staff will host similar event designed to create excitement about TMA programs. A new theme, site and agenda should be developed for each event. The TMA may want to consider hosting the event "in honor of" a partner that makes a significant financial contribution to the organization. The promise of a positive media event can be helpful in leveraging financial contributions from private companies.

GOAL #5: Coordinate And Facilitate Options For Transportation Disadvantaged

Objective A. Define Program Limitations

Action 1. **Define Limitations on MR TMA's Role as a Service Provider for Seniors and Persons With Disabilities**. The MR TMA Board of Directors recognizes that Community Needs Van Service (CNVS) is important to Missoula's senior and disabled residents. However, they

recognize a need to define limitations on MR TMA's role as a service provider for seniors and persons with disabilities and to prevent the duplication of services. MR TMA will take the lead in organizing a regional summit with Specialized Transportation Advisory Committee member organizations to discuss allocation of services between Missoula area providers. Outcomes of this summit will include: (1) a clearly defined role for CNVS in meeting regional senior and disabled service needs and (2) clearly identified target markets for CNVS and other STAC providers.

Objective B. Set Program Goals

Action 1. **Identify Thresholds for CNVS Program**. The MR TMA has made a commitment to continue the provision of CNVS service on its current four days per week schedule. Staff has and will continue to work closely with MDT to identify funding restrictions and availability of operational funding for CNVS. An increasing senior population will put additional pressure on senior and disabled transportation services over the next five years. CNVS is currently operating at full capacity and can only expect more demand for rides as the program become better known. The MR TMA Board will identify capacity thresholds or performance measures that trigger demand management measures or tightened eligibility requirements.

MR TMA should also reconsider its current practice of occasionally using administrative staff and vehicles to cover trips when in-service vehicles are not available. This skews demand measurements and draws on resources allocated to other activities or programs.

Next Steps

The implementation stage of the Five-Year Strategic Plan will take place between September 2003 and approximately June 2008. Much of the plan work is front loaded and MR TMA staff and Board members should hold a special work session or retreat once every year to review progress on specific Strategic Work Plan objectives. Each action item includes a designated lead (staff or board) and a description of resources required to complete the item.[2] For example, to achieve Goal 1, Objective A (Identify Options and Modes, two specific action items have been identified: (1) develop a MR TMA marketing plan and (2) explore the feasibility of consolidating regional rideshare/ridematching services. Each action item identifies more specific subtasks, to which responsibility assignments and costs are attached.

[2] Specific staff and/or Board Members should be assigned to each action item and subtask on approval of this plan.

Timeline

Each action item and sub task is linked to a delivery date. This is designed to help task leads prioritize their implementation responsibilities and keep track of their progress. Taking the example above, the target date for the completion of all action items under Goal 1, Objective A is January 2004. The broader timeline for completion of Action Plan subtasks leading up to the completion of the overall objective is September 2003 through January 2004.

This is a rolling five-year strategic plan to be reviewed on an annual basis.

Attachment A: Strategic Work Plan Matrix

The following matrix is designed to provide a detailed reference for MR TMA staff and Board members to use in implementing desired objectives and action items. It provides detail on responsibilities, costs and action item timeline/deliverable dates.

MR TMA MISSION STATEMENT

TO CREATE A MORE LIVABLE REGION, MR TMA PROMOTES THE AVAILABILITY OF TRANSPORTATION OPTIONS TO EFFECT REDUCED USE OF THE SINGLE OCCUPANCY VEHICLE. TO ACCOMPLISH THIS, MR MTA WILL PROVIDE RIDE SHARING PROGRAMS, RIDE MATCHING AND SCHEDULING SERVICES AND COORDINATION OF PARK & RIDE FACILITIES.

MR TMA WILL ALSO WORK WITH ITS PUBLIC AND PRIVATE SECTOR PARTNERS TO SERVE AS A CONVENIENT CLEARINGHOUSE FOR INFORMATION ON OTHER TRANSPORTATION CHOICES.

GOAL #1: INCREASE REGIONAL NON-SOV TRIPS

- ❖ Identify Options and Modes
- ❖ Develop Baseline for Program Monitoring

Objectives	Action Items	Sub Tasks	Timeline	Responsibility	Estimated Cost	Cost Description	Projected Impact/Success Measures
A. Identify Options and Modes	Develop MR TMA Marketing Plan	Develop Draft Marketing Plan	**Complete** Aug. 03	Staff (Lyn H.)	On-Going TMA Operations	TMA Staff Time	• Clearly defined, marketable programs designed to increase non-SOV trips • Short term financial goals for marketing identified programs (in-line with prioritization)
		Board Approval and Review of Marketing Plan	**Complete** Aug. 03	Board			
		Implementation of Marketing Plan	Nov. 03 ->	Staff/Board	$16,450	Multi-Medium Advertising	
	Explore Consolidation of Rideshare/Ridematching Programs	Meet with Other Agencies Providing Ridematch Services, Missoula-In-Motion and Other Key Stakeholders	Dec. 04	Staff w/ participation of other agencies	On-Going TMA Operations	TMA Staff Time	• Determine whether there is consensus on the need to create a single consolidated ridematching service
		Determine Feasibility of Consolidating Ridematching Services	Jan. 04	Staff/Board	$1,000 for database consulting	TMA Staff Time/Consulting	• If feasible, develop action plan for managing regional ridematching database and website

B. Develop Baseline for Program Monitoring	Develop Baseline Reporting and Set Targets	Compile Baseline Data and Develop Baseline Performance Report	Aug. 03 & Once Annually Thereafter	Staff	On-Going TMA Operations	TMA Staff Time	• Comprehensive list of existing regional trip and modal data (including schedule for any regular updates)
		Set One Year Targets for Each MR TMA Program (Vanpool, Rideshare, P&R, Outreach, CNVS)	Sept. 03 & Once Annually Thereafter	Board/ Staff *(Requires Board Adoption of Targets)*	$500 for goal setting facilitator	TMA Staff Time/ Facilitation	• Measurable targets for all MR TMA programs tied to baseline performance report
	Assess Achievement and Redefine Targets	Develop Achievement Report	Aug. 04 & Once Annually Thereafter	Staff	On-Going TMA Operations	TMA Staff Time	• End of year (work plan period) assessment of objectives & action items
		Reassess Goals and Refine Targets	Sept. 04 & Once Annually Thereafter	Board/ Staff *(Requires Board Adoption of Targets)*	$500 for goal setting facilitator	TMA Staff Time/ Facilitation	• Reevaluate and refine any work plan items that were not achieved • Set new objectives and/or action items for coming year
C. Grow Vanpool Program as Demand Merits	Attract new riders through focused marketing	Increase number of vanpools in operation by one or more each year	Sept. 03 – Sept 08	Staff	See Objective A	Staff Time & Focused Marketing	• Increase in vanpool ridership • Addition of one or more vanpools per year
	Provide new, safe, reliable vanpool fleet	Make vehicles available to meet vanpool demands	Sept. 03 – Sept 08	Staff	**Current year cost of 13-passenger van**	Replacement & Expansion Vans	• High quality reliable fleet vehicles • Vehicles available to meet vanpool demand

GOAL #2: PROVIDE REGIONAL EDUCATION ON TRANSPORTATION DEMAND MANAGEMENT

- ❖ Identify Groups to Target through Outreach
- ❖ Set Goals for the Number of Outreach Meetings with Each Identified Target
- ❖ Make TDM Resources Available via the Web and Informational Clearinghouse

Objectives	Action Items	Sub Tasks	Timeline	Responsibility	Estimated Cost	Cost Description	Projected Impact/Success Measures
A. Identify Target Groups for Outreach & Set Goals	Create prioritized outreach plan	Hold work session with Board of Directors & MR TMA staff to identify top 10 Candidate Groups for outreach (i.e., high school students, elementary students, employers with 100+ employees, etc.)	**Complete** for 03 *(Review Annually)*	Staff/Board	On-Going TMA Operations	MR TMA Staff Time	• Board of Directors approved top 10 target outreach groups • Board of Directors prioritizes outreach to target groups • Outreach goals incorporated into MR TMA Marketing Plan
		Prioritize identified outreach targets	**Complete** for 03 *(Review Annually)*				

B. Conduct Ongoing Outreach to Key Groups in Region	Develop Defining Message and Communication Materials	Develop Presentation and Collateral Materials for Educational Presentation on TDM & MR TMA Services	Aug 03 – Jan 04	Staff w/ Board Approval	$1,500 - $2,500 Annually for Collateral Materials	MR TMA Staff Time/Materials	• Clear and informative presentation that MR TMA staff can use in speaker's bureau type presentations • Collateral materials for wide distribution that include basic MR TMA info (i.e., logo, phone, web)
	Coordinate With Missoula In Motion	Develop a coordinated strategy for outreach meetings with Missoula in Motion (ensures outreach targets understand differences in programs)	Jan 04	Staff in Coordination with MIM	On-Going TMA Operations	MR TMA Staff Time	• Strategy to ensure common outreach targets understand difference between MIM and MR TMA • Agreement to attend outreach meetings jointly
	Hold Meetings with Key Outreach Groups (identified in A)	Hold at least 4 meetings with (1) City of Missoula, (2) Top 10 Regional Employers, (3) University of Montana/ASUM, & (4) Counties of Missoula, Ravalli, Lake, Mineral, Granite	Jan 04 – Aug 04	Board Member (Accompanied by Staff)	On-Going TMA Operations	MR TMA Staff Time	• Direct contact strategy to develop partnerships with key outreach targets (Top priority)
		Hold at least 3 meetings with Chambers of Commerce from Missoula, Ravalli and Lake Counties	Jan 04 – Aug 04	Board Member (Accompanied by Staff)	On-Going TMA Operations	MR TMA Staff Time	• Secondary outreach targets for Board/Staff to meet with

C. Improve/Add Office Space and Develop TDM Clearinghouse Resources	Research Office Space Availability/Funding and Move	Siting and Design of New Office, Meeting Room and TDM Store Facility	**Complete**	Staff	NA	Included in facility design and construction costs	• **Complete**
		Construction of New Facility	September 04				• New administrative and storefront space
	Develop TDM Store - Information Clearinghouse and Resource Center	Research Materials and Store Design	Aug 03-Aug 04	Staff	$500	Staff time/travel	• Determine optimal design for TDM Store
		Open TDM Store at New Facility	September 04		$5,000	Store set up	• Open TDM store and provide TDM materials and information
D. Upgrade MR TMA Website	Evaluate Grant Sources to Fund Website Development	Work with Montana Department of Transportation to Research Funding Availability	Complete	Staff/ Consultant	$1,450	Web-Design Consultant	• Funded through RTAP • Includes environmental calculator
	Design New Website	Develop and Integrate MR TMA Marketing Materials in New Website Design	Jan 04 - Aug 04	Staff w/contract web designer	See Above	Web-Design Consultant	• MR TMA logo and marketing materials should be consistent for all outreach/ information sources
		Develop Links with Strategic Partner Websites	Jan 04 - Aug 04	Staff w/contract web designer	See Above	Web-Design Consultant	• Links to and from partner web sites
		Design Web Interface for Ridematching Service (If Applicable)	Jan 04 - Aug 04	Staff w/contract web designer	$5,000	Contract Web Site Design/database development	• Single web-site for all ridematching. Including on-line search and matching capabilities
	Launch & Maintain New Website	Host and maintain new website	Sept 04	Staff	$360 Hosting/ $1000 annually for maintenance	Web site hosting and maintenance costs	• Reliable and functional web site

GOAL #3: CREATE AN ORGANIZATIONAL DEVELOPMENT STRATEGY

- ❖ Host Board Retreat to Develop Funding and Advocacy Agenda
- ❖ Develop Committee Structure and Work Plans
- ❖ Reorganize TMA Staffing

Objectives	Action Items	Sub Tasks	Timeline	Responsibility	Estimated Cost	Cost Description	Projected Impact/Success Measures
A. Host Board Retreat to Develop Funding and Advocacy Agenda	Plan, organize and host Board of Directors retreat	Arrange Outside Facilitator to Host Board Retreat	June 04	Staff	On-Going TMA Operations	TMA Staff	• Plan and host annual Board of Directors Retreat • Board buy-in on implementable action items for FY04-05 • Revised action plan and matrix • August 04 retreat results in advocacy agenda and assigned Board/Staff responsibilities for FY04-05
		Develop Agenda and Supporting Materials for Retreat	July 04 – Aug 04	Staff	On-Going TMA Operations	TMA Staff	
		Hold Board Retreat	Aug 04	Board w/staff participation	$500 for facilitator	**Facilitation**	
	Develop Funding and Advocacy Agenda	Develop One-Year Work Tasks Based on Board Retreat	Sept 04	Staff	On-Going TMA Operations	TMA Staff	

B. Develop Committee Structure to Support and Further Advocacy of MR TMA Programs	Evaluate Need for Program Specific Committees	Annual review of need for supporting committees based on program goals and advocacy agenda	Annually	Board/Staff	On-Going TMA Operations	TMA Staff	• Currently no need for Program Committees When Board Approves Committee, TMA will: • Develop internal staff work plan to provide support/staffing for committees • Develop committee member recruitment plan and timeline
	Develop Committee Structure to Support MR TMA Programs	Appoint MR TMA Board representatives (if necessary) and assign MR TMA staff to support new committees	*(Only when Board decides a committee is needed to work on a specific program [i.e., vanpool, marketing, etc....])*	Board/Staff	Varies	Depending on committee size and staff support needs	
		Identify potential committee members and recruit		Board/Staff	On-Going TMA Operations	TMA Staff	
		Develop Committee Work Plan		Staff w/ Board Approval	$500 for facilitator	**Facilitation**	• Develop detailed committee work plan through facilitated Board/Staff work session
C. Reorganize MR TMA Staffing	Reorganize MR TMA staffing to improve efficiency and establish accountable leadership role	Eliminate Confusing, Costly Dual-Directorship Structure	Sept. 04 – Jan 04	Board	na	na	• Increase visibility and accountability of TMA through single Executive Director • Decrease staffing costs required to pay 2 directors • Increase accountability of TMA programs through program-by-program management
		Appoint/Hire Single Executive Director					
		Restructure of staff positions as program directorships or support					

D. Review, Adopt and Implement Strategic Work Plan	Board Review of Strategic Work Plan	Review Program Operations and Performance and Determine Action Items for Next Year	Once Annually	Board/Staff	$500 for facilitator	Facilitation	• Facilitated review of performance and operations (Annual Board Retreat) • Development of annual Strategic Work Plan Actions • Responsibilities assigned to each item • Implementation timeline and plan for each action
		Review Organization and Funding and Determine Action Items for Next Year	Once Annually	Board/Staff			
		Review Governance & Leadership and Develop Action Items for Next Year	Once Annually	Board/Staff			
		Adoption of Revised Strategic Work Plan	Once Annually	Board			
	Implement Strategic Work Plan Action Items	Assign roles and Responsibilities and Monitor	Ongoing Annually following Board Adoption	Staff & Board	On-Going TMA Operations	TMA Staff	• Develop Benchmarks for Action Items • Ongoing implementation of Work Plan

GOAL #4: CREATE PARTNERSHIPS TO SUPPORT MR TMA's EFFORTS/MISSIONS

❖ Identify, Categorize and Recruit Strategic Partners

Objectives	Action Items	Sub Tasks	Timeline	Responsibility	Estimated Cost	Cost Description	Projected Impact/Success Measures
A. Develop MR TMA Board of Directors through Strategic Partnerships	Maintain Board composition and develop group dynamics	Board of Directors meets monthly	Aug. 03 – Jan 04	Board	On-going TMA operation	None	▪ Improved communication, problem solving and dynamics among existing Board Members
	Begin active recruitment of new Board Members	Recruit Attorney to serve on MR TMA Board and act as organizational and support resource	Aug. 03 – Aug 04	Board/Staff	On-going TMA operation	None	▪ Active Board Member to provide legal and organizational support
		Recruit one new Board member from each of the following areas: (1) Development/Building Industry Representative (2) Hospitals/Medical Representative	Feb. 04 – Aug. 04	Board/Staff	On-going TMA operation	None	▪ Partners all aware of top three goals for MR TMA ▪ Improved community understanding of MR TMA Mission & Goals
	Review Need for Representation of Other Partner Organizations on MR TMA Board	Recruit new members as needed up to maximum of 15 members	Bi-Annual Review	Board	On-going TMA operation	TMA Staff	• Expanded Board with representation by target group representatives

B. Identify and Recruit Partners	Identify Key Strategic Partners in MR TMA Service Area [1]	Identify partners able to Assist MR TMA Politically, Fiscally, or through Advocacy	**Complete**	Board/Staff	na	na	▪ See list below
	Meet Individually with Partners to Share MR TMA Mission & Goals	Identify top three service or organizational goals and funding needs for attainment through regional partnerships	Aug 03 – Jan 04	Board/Staff	On-going TMA operation	TMA Staff Time	• Prioritized list of top three areas where MR TMA could use partner support/cooperation
		Arrange meetings with Partner Organizations/Agencies	Jan 04 – Jan 05	Staff w/Board Member in attendance	On-going TMA operation	TMA Staff Time	• Partner buy-In from groups/organizations in top three categories
C. Hold Partner Event to Educate Partners About TMA and Promote Buy-In	Invite identified MR TMA partner representatives to 1st MR TMA partner event	Host Partner Event as part of Ribbon Cutting Ceremony for new Dornblaser Facility	Summer/ Fall 04	Staff w/Board Members in Attendance	$500	Presentation materials, food/refreshments, etc.	▪ Successful event designed to promote and educate partners about TDM and MR TMA activities ▪ Increased partner buy-in, understanding of MR TMA Programs and Support of Mission and Goals
	Develop and Host Annual Partner Event	Event development (choose theme, site and agenda)	Annual Event	Staff	On-going TMA operation	TMA Staff Time	▪ Develop event plan and supporting materials list
		Host event	Annual Event	Staff & Board	$500	Presentation materials, food/refreshments, etc.	▪ Successful event designed to promote and educate partners ▪ Increased partner buy-in

(1) Key Strategic Partners Identified by MR TMA Board members during the July 23rd, 2003 workshop include:

- University of Montana
- Service Work Force Center
- Board of Realtors
- Building Industry/Developers
- Missoula Urban Transit District
- City of Missoula
- Missoula County
- Ravalli County
- Lake County
- Mineral County
- Granite County
- Missoula In Motion
- Office of Public Assistance
- Area School Districts
- Aging Services
- Missoula Parking Commission
- Small Business Organizations
- All area Hospitals and Medical Industry
- VA Clinics

GOAL #5: COORDINATE AND FACILITATE OPTIONS FOR TRANSPORTATION DISADVANTAGED

❖ Define Program Limitations and Set Funding Goals/Restrictions

Objectives	Action Items	Sub Tasks	Timeline	Responsibility	Estimated Cost	Cost Description	Projected Impact/Success Measures
A. Define Program Limitations	Define limitations on MR TMA's role as a service provider for seniors and persons with disabilities	Organize Regional Summit with STAC Member Organizations to Discuss Allocation of Services between multiple providers	Aug 03 – Jan 04	Staff	On-going TMA Operations	Staff time and costs for Board Meetings	▪ Clearly defined role for CNVS in meeting regional senior and disabled service needs ▪ Identified target populations for CNVS vs. other regional elderly and disabled services
		Define target market(s) for CNVS program	Feb 04 - Aug 04	Staff & Board			
B. Set Program Goals	Identify thresholds for CNVS program	Work with MDT to identify funding restrictions and availability of operational funding for CNVS	Oct. 03 – April 04	Staff	On-going TMA Operations	Staff time and costs for Board Meetings	▪ Program funding plan for senior and disabled services and coordination programs ▪ Identified service/cost thresholds and demand management actions if these are met
		Identify thresholds that trigger demand management measures for CNVS program (i.e., current service @ capacity = new eligibility restrictions)	April 04 – Aug. 04	Staff w/ Board Approval			

Attachment B:

Summary of MR TMA Services & Organization

MR TMA provides a range of services to residents of Missoula, Ravalli and Lake, Mineral and Granite Counties. Figure 1 below provides a summary of MR TMA program activities.

Figure 1 MR TMA Services

Service	Description	Other
Ride Sharing **(Ridematching)**	MR TMA administers a ride-matching program designed to link people commuting to and from Missoula in Missoula, Ravalli and Lake Counties. MR TMA staff is also available to work with employers to establish on-site employee trip coordinators.	Ride-matching is available on line, by phone and on site at the MR TMA offices.
Vanpools	Provides participant operated vanpools to over 30 worksites in Missoula. 5 vanpools currently operate on the US 93 corridor south of Missoula; stopping at designated Park & Ride sites inbound to Missoula. 1 Vanpool operates on I-90 West from Alberton to Missoula 1 reverse commute vanpool operates from Missoula to Hamilton	Vans are owned and leased by MR TMA with full insurance coverage. New vanpools can be started with a commitment from 9 passengers. Vanpool costs range from $7.50 per day round trip from Hamilton to Missoula to $2.00 per day from Lolo to Missoula. Discounted multi-day, weekly and monthly contributions are available. Contributions are waived for volunteer drivers who drive two days per week or more.

Service	Description	Other
Community Needs Van Service (CNVS)	Provides rides to Seniors and persons with disabilities in the Missoula urban area to medical appointments, shopping and recreational activities. Reservations can be made by phone directly through the MR TMA offices. Trip availability is on a first-come-first serve basis and same day reservations are accepted. Contribution is $1.00 per trip and punch cards are available.	Organized through a partnership with the Specialized Transportation Advisory Committee. The Missoula to Hamilton reverse commute van is now being utilized locally by the Hamilton Senior Center to provide local trips to seniors on weekdays. Service is available 9:00 AM to 3:00 PM Monday – Friday. Wheelchair accessible rides provided on Tuesdays and Thursdays.
Park and Ride	MR TMA provides designated Park & Ride areas for vanpool participants and carpoolers along the Highway 93 corridor. See complete list of Park & Ride sites below.	Ongoing work with University of Montana and Missoula Parking Commission to develop preferential parking areas for carpool commuters.
Guaranteed Ride Home	Provides guaranteed ride home through a contract with Yellow Cab for all registered carpool and vanpool participants, Griz Card holders, Mountain Line monthly pass holders, 11 ride punch cards and EZ pass holders.	Service is available up to 4 times per year to any qualifying individual.
School Outreach	MR TMA has a staff position dedicated to providing educational outreach to elementary, middle and high school students. Programs are designed to educate Missoula, Ravalli and Lake County students about Transportation Demand Management and viable alternatives to single occupancy vehicle commuting.	

Service	Description	Other
Specialized Transportation Coordination	MR TMA is working in partnership with Missoula Specialized Transportation Advisory Committee and the Lake County TAC to coordinate provider resources and create more transportation options and more cost effective services for seniors and persons with disabilities.	These efforts have largely been focused in Missoula and to some extent in Ravalli County and Lake County.

Vanpool Program

MR TMA owns and operates a fleet of nine 2002 Dodge B3500 Maxivans with customized seating arrangements for 13 passengers. The TMA uses these vans to established vanpool groups consisting of six or more passengers. The vanpool program operates under the name *I-Ride*. Subsidized leases are paid through customer contributions; MR TMA has an established contribution schedule based on length of trip and contributions are payable in daily, weekly or monthly increments. MR TMA pays for vehicle fuel, oil and maintenance. The bi-monthly cleaning is the responsibility of the vanpool drivers, who are compensated $35 per month for performing this service. Detailing and preventive maintenance of vehicles is contracted with local companies.

MR TMA currently operates vanpools on the following routes:

Van #1: From Bitterroot Valley on Highway 93 to South Avenue, then Arthur to drop off at UM Lodge. Continue on to Madison then Broadway for St. Patrick's Hospital drop off, then back to UM or Adventure Cycling (downtown).

Alternate route: Highway 93 to Stephens/Orange Street to Broadway to Hospital drop off, then Spruce and Madison to final destination at UM.

Van #2 : From Bitterroot Valley on Highway 93 to Reserve Street then South Avenue, continue on Reserve to Mount, Mount to Stephens then Orange, right on Front Street and to Higgins dropoff. The vehicle continues onto Pine Street to its final destination at City Hall parking lot.

Alternate route: Highway 93 to Higgins by Hellgate High School toward downtown then to Main, Ryman and City Hall parking lot.

Van #3: From Bitterroot Valley on Highway 93 to Brooks then right on South Avenue for drop off at College of Technology. Continue south to Park (drop off for Lewis and Clark school) continue south to Arthur to UM Lodge then around to continuing education and parking garages on Campus Drive.

Van #4: From Bitterroot Valley on Highway 93 to North Reserve Street then Mullan to Great Northern Way, then to American Way, returning to Farm Credit across from Target. Final destination Internet Connect Services, Farm Credit or APS Health Care.

Van #5: From Florence north on Highway 93, pickup in lots at Wal-Mart and Rosauers, then direct to Smurfit Stone.

Van #6: From Alberton east on I-90 to Orange Street exit in Missoula. Vanpool destinations in Missoula include: City Hall, County Offices, UM Lodge parking lot, COT and Centennial High School.

Van #8: From Walmart on Brooks south on Highway 93 with pick-ups at park & ride sites in Lolo, Florence, Stevensville, to Old Corvallis Road to downtown Hamilton, continuing to Rocky Mountain Labs.

Figure 2 shows established park & ride locations in the three main corridors served by MR TMA (I-Ride) vanpools. The table also shows Park & Ride sites in Missoula and new or planned park & ride locations.

Figure 2: MR TMA Park & Ride Locations

Site	Location
Bitterroot Valley (Highway 93 South)	
Hardee's	Hamilton
Sheafman Creek	Victor
Cantina Lacocina Rest.	Victor
Super One Foods	Stevensville
Gary & Leo's IGA	Florence
Chief Looking Glass	Florence
E Carlton Creek Roard	Florence/Lolo
By Double Front	Lolo
Harvest Foods	Lolo
Alberton	
Rock Creek Fishing Access	Alberton
9 mile	9 mile on ramp
Huson Exit, NW Corner	Huson
Frenchtown Club	Frenchtown
Highway 93 North	
Harvest Foods	Ronan
Country Side Café	Charlo Cutoff
Tribal Fitness Center	St. Ignatius
Ravalli Comm. Church	Ravalli
Jocko Valley Lutheran Ch.	Arlee
Joe's Smoke Ring	Evaro
Missoula Park & Rides	
Wal-Mart South	Missoula
Rosauer's Foods	Missoula
New Park & Rides	
Rock Creek Lodge	Rock Creek
By Blue Horse Gym	Clinton
To be determined	Donovan Creek Road
The Other Place	Turah
Travel Plaza	Bonner/E Missoula

Figure 3 below shows the MR TMA vanpool program's annual operating statistics for 2002. During 2002, the program provided 18,278 commute trips to approximately 100 passengers. Total annual vehicle miles of service were 123,612 at an average of 0.15 riders per mile. This equates to an annual reduction of 1,598,813 miles or 21,287 trips over single occupancy commute activity. These activities have a measurable annual impact on the release of carbon dioxide, carbon monoxide, nitrogen oxides and

particulate matter in the Missoula Basin. This is important as the region faces ongoing air quality issues caused by its inversion prone airshed.

Figure 3: 2002 Vanpool Operating Statistics

	Jan. - March	April - June	July - Sept.	Oct. - Dec.	TOTAL
Riders	268	247	238	270	**1,023**
Trips	5450	4362	3558	4908	**18,278**
Avg. Weekday Ridership	87	68	57	78	**72.5**
Total Vehicle Miles	32,944	30,826	28,138	31,704	**123,612**
Riders/Mile	0.17	0.14	0.13	0.15	**0.15**
Vehicle Trips Reduced	6,331	5,060	4,421	5,475	**21,287**
Vehicle Miles Reduced	457,060	356,619	339,905	445,229	**1,598,813**
Rider Contributions (Fares)	$6,767	$5,754	$4,943	$6,659	**$24,123**
Operating Expenses	$20,236	$16,363	$5,284	$8,289	**$50,172**
Match Obligation	$4,386	$3,670	$3,153	$4,655	**$15,865**
Revenue/Trip	$1.24	$1.32	$1.38	$1.36	**$1.33**
Expense/Trip	$3.71	$3.76	$1.44	$1.70	**$2.65**
Revenue/Mile	$0.21	$0.19	$0.18	$0.21	**$0.19**
Expense/Mile	$0.61	$0.53	$0.19	$0.26	**$0.40**

Community Needs Van Service

MR TMA began operating the Community Needs Van Service (CNVS) in 2001. The service area is the City of Missoula. CNVS service is operated in coordination with the Specialized Transportation Advisory Committee (STAC), a policy committee dedicated to improving access to transportation for Missoula area seniors and adults with disabilities. MR TMA implemented the service based on a perceived opportunity to use inactive vanpool vehicles during the day to meet local senior and disabled transportation needs. The service is open to all senior and disabled adults in the Missoula urban area and is focused on providing access to medical and shopping facilities for those who are unable to access services provided by Mountain Line or other local providers. MR TMA does not enforce eligibility requirements comparable to those mandated by ADA law for comparable paratransit service or for other local client based services.

CNVS provides wheelchair accessible service on Tuesdays and Thursdays using back-up buses from the Community Medical Center.

CNVS is able to provide very cost effective trips, as the MR TMA vanpool program subsidizes its operating expenses. CNVS drivers are recruited through the Green Thumb program, an employment program for low-income residents. Driver salaries are paid from the MR TMA budget.

Lake County Coordination Work

Currently Lake County transportation providers are experiencing difficulty in coordinating rides to Missoula for medical treatments/appointments. If they can get an individual to Missoula County they have little or no means of coordinating transportation within the Missoula area. The MTA transportation coordination web based program will be utilized by MR TMA staff to facilitate the elimination of the above-described barriers. The Senior/AWD Coordinator will be responsible for working with Lake County TAC members and case managers to schedule rides with Missoula providers.

The MR TMA Director of Community Affairs will be responsible for working with the Confederated Salish Kootenai Tribes (CSKT) and other Lake County providers to develop partnerships, which will result in trip chaining between those partners. MR TMA will lead outreach activities in Lake County, including the development of a Marketing plan and securing funding. At this point MR TMA will in most likely train the dispatcher for CSKT. Through partnerships MR TMA is working with Lake County agencies to promote a single-providers service to Missoula each weekday, which would carry partner clients.

Update on current accomplishments: MR TMA assisted the Lake County TAC/CSKT in negotiating acceptance of vouchers from Rimrock Trailways; MR TMA has assisted in forming partnerships with Mission Mountain Enterprises, Mountain Line, Community Medical Center, Opportunity Resources and Hot Springs Senior Center.

Current research projects include: (1) development of park-n-ride sites for providers to coordinate transfers and routing; (2) the development of an RSVP program for volunteer drivers for CSKT and Mission Mountain Enterprises; (3) integrating school buses and/or drivers into the transportation system; (4) development of reverse commute vanpool service from Missoula to Mission Valley; (5) development of a transportation inventory; (6) negotiating expansion of Sanders County Senior Bus to 3 days per week; (7) establishing a toll-free line for case workers to access CSKT and MR TMA dispatchers; (8) recruitment of business sector TAC members; and (9) grant writing to secure sustainable funding.

Organization and Operations

A Board of Directors consisting largely of representatives from local and regional government and business interests governs the MR TMA. The Missoula Urban Transportation District, the City of Missoula, the Missoula Parking Commission, Missoula County, Ravalli County, the University of Montana, the Montana Job Service and one private business are currently represented on the Board. A number of MR TMA Board members are newly appointed, as several long-standing members left during FY2002-03. The current representation is heavily weighted toward local government and includes just one local business representative. Lack of representation by the local business community and participating vanpool program employers may be a significant limitation considering several of MR TMA's core programs target commuting employees.

MR TMA's administrative services operate under a joint directorship. Administrative staff descriptions are as follow:

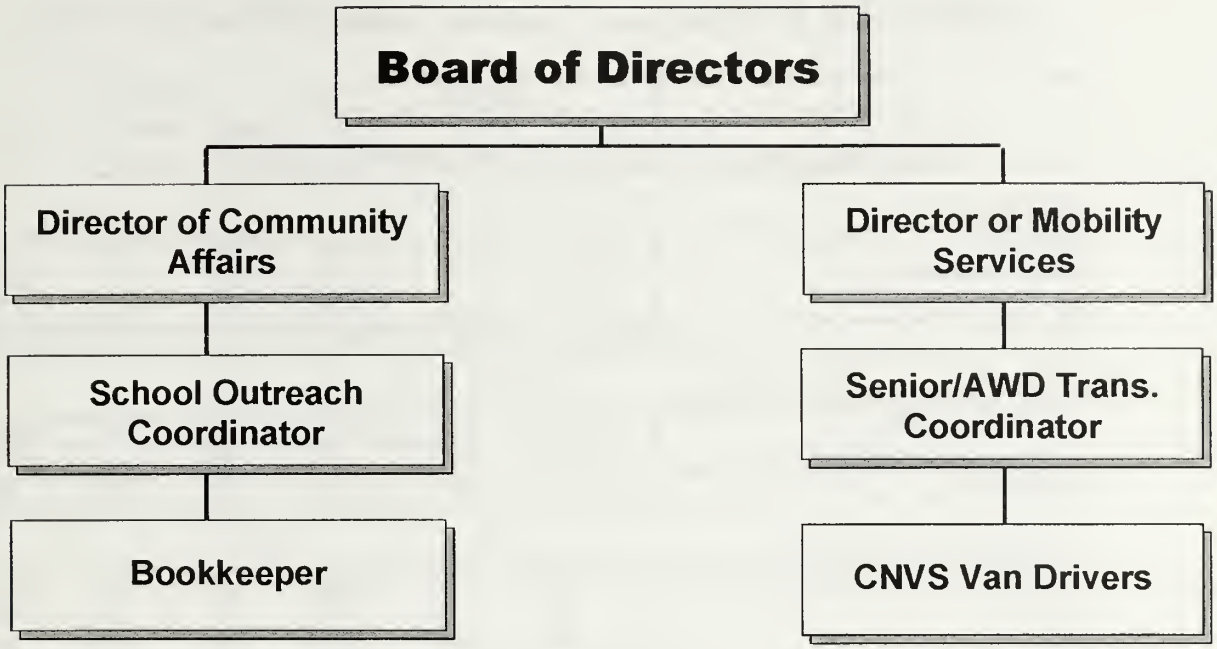
Director of Mobility Services (1 FTE): This position is responsible for developing and implementing strategy for continued growth and support for commuter, senior and AWD transit in Missoula and the surrounding four counties. This includes administering the MR TMA vanpool and Community Needs Van Service Programs. This position works with the Ravalli County TAC and Specialized Transportation Advisory Committee (STAC) on senior and adult with disabilities transportation.

Director of Community Affairs (1 FTE): This position is responsible for developing and implementing strategies for building support for public transit in Missoula and the surrounding four counties. This includes directing communications between MR TMA clients, government agencies, businesses and community groups. This position works with the Lake County TAC to improve transportation for tribal members, seniors and adults with disabilities through increased efficiency of existing resources and coordinated services. This position is also responsible for administrative and fiscal functions of the agency to include budgeting, grant writing and fund raising.

Transportation Coordinator (1 FTE): This position is designed to work with Missoula's Specialized Transportation Advisory Committee (STAC) to improve transportation for seniors and adults with disabilities through increased efficiency of existing resources and coordinated services. This position is responsible for assisting the MR TMA Directors and other program staff in fulfilling the goals of the organization and reporting its successes.

School Outreach Coordinator (Part time): This position is chartered to design, schedule and conduct transportation education programs in Missoula and Ravalli counties at the elementary, middle and high school level. Presentations will be made at schools in both counties. Programs should educate students about the fundamental principles of transportation demand management and alternatives to single occupancy vehicle use on behalf or MR TMA.

The following chart shows the organization of MR TMA by Board and staff position.



Funding and Expenditures

Outreach Program Revenues and Expenditures

MR TMA is funded through federal Congestion Mitigation Air Quality (CMAQ) funds allocated by MDT with local match support from a number of agencies and private entities. The State Highway Department has approved ongoing funding from CMAQ to support outreach activities. Figure 4 outlines MR TMA program budget for the last two fiscal years.

Figure 4 MR TMA Outreach Program Budget (FY01-02 & FY02-03)

	2001-02			2002-03		
	Federal (75%)	Match (25%)	Total	Federal (75%)	Match (25%)	Total
STAFFING						
Salaries	83,063	20,766	103,829	90,967	30,321	121,288
Health Insurance	10,170	2,543	12,713	10,475	3,492	13,967
Employer Taxes	9,142	2,286	11,428	9,517	3,172	12,689
SUBOTAL	$102,375	$25,594	$127,969	$110,959	$36,985	$147,944
CONTACT WORK/PROFESSIONAL						
Accounting & Admin	2,250	563	2,813	3,068	1,022	4,090
Consulting & Contact Services	750	188	938	1,158	387	1,545
SUBTOTAL	$3,000	$750	$3,750	$4,226	$1,409	$5,635
EQUIPMENT						
Computer Equipment/Upgrades	1,350	338	1,688	348	116	464
Equipment	75	19	94	77	26	103
Office	900	225	1,125	559	187	746
Resource Center Materials	225	56	281	154	52	206
Software	300	75	375	309	103	412
SUBTOTAL	$2,850	$713	$3,563	$1,447	$484	$1,931
OPERATIONS						
Audio/Visual	225	56	281	225	75	300
Bank Service Charges	30	8	38	30	10	40
Board Development/Travel	1,200	300	1,500	765	255	1,020
Carpool Operations	750	188	938	773	257	1,030
Conventions/Prof. Training/Staff Travel	4,500	1,125	5,625	3,477	1,158	4,635
Equipment Maint. & Repair	165	41	206	165	55	220
Membership Dues/Subscriptions	450	113	563	456	152	608
Office Supplies	2,250	563	2,813	2,318	772	3,090
Postage and Delivery	1,200	300	1,500	1,206	402	1,608
Printing and Reproduction	1,650	413	2,063	1,854	618	2,472
Public Relations	1,575	394	1,969	1,622	541	2,163
Rent	6,600	1,650	8,250	7,335	2,445	9,780
Seniors/ Adults with Disablities Oper.	4,500	1,125	5,625			
Telephone/Utilities	2,625	656	3,281	3,167	1,055	4,222
SUBTOTAL	$27,720	$6,930	$34,650	$23,393	$7,795	$31,188
TOTALS	**$135,945**	**$33,986**	**$169,931**	**$140,025**	**$46,673**	**$186,698**

As shown in Figure 4, MR TMA is required to raise local match funds totaling 25 percent of federal CMAQ funding. MR TMA's CMAQ funding totaled $140,025 in FY02-03, requiring a local match of approximately $47,000. The TMA is able to raise this match through vanpool contributions and contributions from a number of local government agencies and organizations. Figure 5 provides a summary of FY02-03 match fund contributions:

Figure 5 MR TMA Local Match Fund Contributions (FY02-03)

Agency/Organization	Contribution
MR TMA Passenger Contributions	$13,777
City of Missoula	$10,000
Missoula County	$7,500
University of Montana	$7,000
Missoula Parking Commission	$7,500
St. Patrick's Hospital	$3,000
Other	$7,050
TOTAL	**$55,827**

Vanpool & CNVS Program Revenues and Expenditures

MR TMA is currently in negotiations with MDT to secure long-term funding for vanpool operations. Currently, vanpool and CNVS operations are funded primarily by federal CMAQ grant funds allocated by MDT. It is currently unclear whether this funding source will be terminated or be approved as an ongoing source. If CMAQ funds are no longer available to support vanpool operations, MR TMA may be eligible for FTA operating funds through the Section 5311 program.

As shown in Figure 6, FY2002-03 vanpool program operating expenses are expected to total $28,940. These costs can be attributed primarily to fuel, oil, maintenance and detailing expenses. All administrative staff costs are included in the primary MR TMA outreach programs budget. Vanpool operating funds come primarily from the CMAQ grant funds distributed by the state ($21,705); the remaining budget ($7,235) is covered by local match funds that come from vanpool participant contributions.

Figure 6: MR TMA Vanpool Program Budget (FY2002-03)

Expense	Federal (75%)	Match (25%)	Program Total
Fuel and Oil	15,120	5,040	20,160
Other Vanpool Expenses	1,800	600	2,400
ADA Contracted Services	375	125	500
CICleaning	2,520	840	3,360
Cell Phones	1,890	630	2,520
TOTAL EXPENSES	**$21,705**	**$7,235**	**$28,940**

Notes:

- Fuel & Oil ($210/mo. X 8 vans x 12 mos.) $20,160
- ADA Services (Contracted) $ 500
- Cleaning ($35/mo. x 8 vans x 12 mos.) $ 3,360
- Cell Phones ($30/mo x 8 vans x 12 mos.) $ 2,520
- Other Vanpool Expenses $ 2,400

Attachment C:
Community Brochure & Questionnaire

As a cooperative effort, MR TMA and Nelson\Nygaard developed an informational brochure combined with a short community transportation needs survey. The brochure/questionnaires were distributed throughout the community at key locations including:

- Major employment sites, including current vanpool destinations;
- High traffic businesses where general public have a chance to view/respond;
- On MR TMA vans, on Mountain Line buses and in the downtown transit center;
- City Hall, Missoula In Motion, University Transportation Office and other public transportation offices;
- Senior Centers and social service offices; and
- Other key sites frequented by local residents.

The coordinated brochure/newsletter provides MR TMA an excellent opportunity to distribute information about its services and to reach members of the public not familiar with its programs. At the same time it allows interested residents to provide input on personal and perceived community transportation needs and issues.

The Brochure

The Outreach Brochure provided basic information about MR TMA projects and activities, including:

- Ride Sharing
- Vanpooling
- Park & Ride Opportunities
- Guaranteed Ride Home
- School Outreach
- Resource Center
- Specialized Transportation Coordination
- Community Needs Van Service

Fiscal, personal and environmental benefits of each program are described and key contact information is provided for citizens interested in MR TMA services.

The Questionnaire

Incorporated in the information brochure was a brief community transportation needs survey. The survey was not designed to collect highly detailed information about multimodal transportation needs, but rather was designed to gauge current use of and interest in MR TMA services. Since the questionnaire was integrated in a brochure about MR TMA services, the survey was designed to poll residents who have some interest in the service provided by the TMA.

Questionnaire Responses

A total of 169 people responded to the questionnaire; 37 were Ravalli County residents and 19 replied from the Missoula in Motion mailing list. The other 113 completed questionnaires came from a number of sources and locations throughout Missoula. Questionnaire responses do not provide a statistically valid sample of public opinion in the MR TMA service area. Rather the effort was intended to provide a sampling of general public opinion about MR TMA and the services it offers.

Respondents were asked to indicate whether they had ever used or currently use MR TMA Vanpool or CNVS services or Mountain Line fixed route or paratransit services. Only six respondents had ever used or are currently using MR TMA vanpools and just two had used the CNVS service. Approximately 45 percent (73) of the respondents have or currently use Mountain Line fixed route services.

Figure 9 Use of Alternative Transportation

Have you ever used?	NO	YES	YES, currently
MRTMA Vanpool	159	2	4
(CNVS)	162	2	0
ML Fixed Route	92	54	19
ML Paratransit	149	6	1

Respondents were asked to indicate how important alternative transportation services were to them personally. Over 50 percent of respondents indicated that MR TMA Vanpool and CNVS were *unimportant* to them. The number of respondents that indicated MR TMA services were *somewhat* to *very* important is substantially higher than the number of people that actually use these services, indicating that people value the services even if they are not customers.

Mountain Line fixed-route bus services were given the highest rankings in terms of importance to survey respondents, not surprising given the comparative levels of use and

visibility. Mountain Line paratransit services were rated almost equally to CNVS in terms of importance to individual respondents.[3]

Figure 10 Importance of Alternative Transportation Services

How important are the following transportation services to you?					
	Unimportant		Somewhat		Very
MRTMA Vanpool	77	9	24	12	26
(CNVS)	77	4	26	13	23
ML Fixed Route	42	11	19	12	52
ML Paratransit	74	5	27	13	23

Respondents were then asked to rate the importance of the same services to their community. Respondents feel that each service had a high level of importance, showing that many respondents place a significant value on alternative transportation services, even if they are not important to them personally. Figure 11 shows how respondents rated service provided by MR TMA and Mountain Line.

Figure 11 Importance of Alternative Transportation Services to the Community

How important are the following transportation services to the community?					
	Unimportant		Somewhat		Very
MRTMA Vanpool	18	5	25	18	90
(CNVS)	10	2	23	18	105
ML Fixed Route	19	2	18	8	111
ML Paratransit	17	6	28	12	93

[3] This survey was not designed to reach a representative sample of Missoula residents and may have been weighted to specific user groups based on distribution techniques.

The questionnaire asked respondents if they or anyone they knew would be more likely to use a MR TMA vanpool based on a number of factors. Figure 12 shows respondents sensitivity to various service elements, passenger contributions and information availability in order of importance.

Figure 12 Sensitivity to Service Elements

Would you or anyone you know be more likely to use MR TMA vanpools if:		
	YES	NO
MR TMA info more available	89	67
Better info on website	74	73
More convenient vanpool times	68	77
Similar service, other routes	65	85
Lower cost for service	64	80
More comfortable vanpool vehicles	51	90

Survey respondents who indicated that they might use MR TMA vanpools if the service better met their needs were asked to list origin and destinations locations they would like vanpools to serve. This question received few responses. Identified origin locations were primarily in the Bitterroot Valley, including: Darby, Hamilton, Stevensville and Lolo. Six out of nine respondents who replied to this question were traveling to the University of Montana and the remaining three were traveling to destinations downtown.

Just one survey respondent had used MR TMA carpool ride matching service. Eleven others indicated that they carpool, but did not use MR TMA to make arrangements. Approximately 43% (67) respondents don't carpool, but know the service is available. A substantial 40% (61) of all respondents had never heard of the service. These figures show that MR TMA ride matching services are not widely known or used among the survey response group.

Figure 13 shows survey respondents level of familiarity with MR TMA carpool ride matching service.

Figure 13 Familiarity with MR TMA Carpool Ride Matching

How familiar are you with MRTMA Carpool Ride Matching Service?	
1	I have used it
11	I carpool, but have never used this service
67	I don't carpool, but have heard of the service
13	I knew MRTMA promoted carpools, but have never heard of the service
61	I have never heard of MRTMA

Respondents were asked to indicate their support for motorized and non-motorized transportation alternatives. Ninety-six (96) percent of respondents indicated that they support the use of alternative modes. Approximately 37 percent of respondents said that they use alternative modes at least occasionally for travel in the Missoula area. Perhaps most significantly, 30 percent of respondents said that they do not currently use alternative modes, but that they would if they were more convenient to them.

Figure 14 Support for Alternative Modes

Which best describes your feeling about alt. transportation in Missoula?	
17	I use alternative modes exclusively
46	I support and regularly use one or more alt. mode
51	I would choose an alternative mode over my car if it were more convenient to me
51	I support alt. Modes for environment and social reasons, but would not use them myself
7	I think money for alt. Modes could be better spent elsewhere

Figure 15 provides a list of major transportation issues identified by survey respondents. Twenty-seven respondents indicated that there was a need for better/increased/less expensive motorized alternative transportation; 11 of these respondents specifically indicated the Hwy. 93 Corridor through the Bitterroot Valley. Non-motorized alternative and fuel-efficiency/air pollution were also identified as major issues.

Figure 15 Major Transportation Issues

What do you think are the most important transportation issues facing Missoula and Ravalli Counties today?	
Need for better/increased/less expensive *motorized* alternative transportation	16
Need for better/increased/less expensive *motorized* alternative transportation, *specifically* in the Bitterroot (Hwy. 93)	11
Need for better/ increased/ less expensive *non-motorized* alternative transportation infrastructure (increase in bike pathways and lanes)	18
Bad drivers, attitudes, road rage	12
Too much pollution and/or inefficient vehicles (including SOV's)	24
Too much traffic/ congestion	16
Too much traffic/ congestion, *specifically* in the Bitterroot (Hwy. 93)	3
OTHER (Including: urban sprawl/ senior transportation/ rail transit/ focus on downtown transportation/ parking)	24

Attachment D:

Stakeholder Input

Nelson\Nygaard conducted a number of interviews with stakeholders throughout the MR TMA service area. A list of stakeholders representing a diverse range of constituent groups was developed in cooperation with MR TMA staff and one-on-one interviews were held both in person (at MR TMA office) and by telephone. Interviews were conducted over the course of several months, between February and April 2003.

Stakeholders were asked to respond to a series of questions addressing topics such as:

- Importance of MR TMA services;
- Coordination of services with other providers/agencies;
- Effectiveness of current organizational structure;
- Unmet commuter vanpool/transportation needs;
- MR TMA's role in providing community outreach;
- Effectiveness of MR TMA outreach efforts; and
- Other input they had about MR TMA organization, operations or funding.

Overall, stakeholders were supportive of TMA activities and felt that the agency played an important role in local and regional transportation provision and policy-making arenas. We have separated comments into four major categories that summarize the emerging themes of these stakeholder interviews:[4]

[4] It is important to note that we only discuss issues or comments that were raised by several stakeholders (at least three) and/or reflect the opinions of a larger customer/constituent groups. Although this is not a scientific evaluation, individual opinions can vary significantly and not accounted for unless supported by other stakeholder groups.

1. **Existing customers are very satisfied.**

   - Vanpool riders and major employers are very supportive of MR TMA vanpool service. Almost unequivocally, stakeholders thought that this program was not yet meeting its potential, in terms of riders carried. Although many stakeholders were aware of the financial constraints to expanding vanpool programs, they largely felt that better public information and visibility would attract more vanpool riders.

   - CNVS riders and senior service representatives like the flexibility and personal customer service provided by this program. Since Mountain Line paratransit service uses a call back reservation system, some paratransit eligible riders have switched to CNVS because they are able to speak directly with a person when booking trips. Several stakeholders felt that CNVS was an important service for seniors who are not eligible for comparable paratransit service, but have physical disabilities that make it difficult for them to access fixed-route bus service.

   - Concern that MR TMA may not be meeting needs of potential/interested customers. While existing MR TMA customers praised services highly, some stakeholders conveyed the experience that potential vanpool and carpool customer inquiries or requests for information are not always met. Specifically, stakeholders referred to instances where MR TMA had not returned calls or been unable to accommodate interested vanpool riders. This may be due to the fact that at times there is very limited capacity to initiate new vanpools or meet specific commuter service requests.

2. **Vanpools, vanpools, vanpools.**

   - Perceived core mission is reducing vehicle miles traveled through commuter vanpools, park & ride, and carpools (intercity trips). Stakeholders saw the promotion of vanpooling as the most important service goal for MR TMA. The development of park & rides in support of vanpool activities was also identified as a high priority goal.

   - Other TMA programs should not come at the expense of meeting regional vanpool (commuter) needs. Several stakeholders felt that the diversification of MR TMA programs has come at the expense of the organization's key missions to reduce vehicle miles traveled through commuter vanpool and carpool programs. At least one stakeholder felt that MR TMA should focus its efforts on assisting commuters in establishing private vanpools and carpools rather than acting as a service provider.

   - More, larger, more efficient vanpools. Stakeholders that we interviewed, including several large employers, feel that there is a significant unmet demand for vanpool service, especially in the Highway 93 Corridor.

   - Primary geographical focus should be the Highway 93 corridor (north & south).

3. **MR TMA needs to define and support a clear and directive mission.**

   - Need for more focused mission (stretched too thin). MR TMA's numerous programs and its recent entry into senior and disabled service provision have left many local

stakeholders feeling confused about what MR TMA's core mission and purpose is.

- Need to eliminate dual-directorship and create a single Executive Director position. A number of stakeholders indicated that there was confusion among their organization and others about who was in charge at MR TMA. Many felt that it was a mistake going to a dual-director structure during a time when the TMA needs strong leadership to promote its internal programs as well as a regional TDM agenda.

- Operating too many programs, some of which don't relate to original organizational mission. Many stakeholders indicated that they felt the TMA would benefit from refocusing its efforts on a smaller number of programs focused around a defined core mission.

- Redundancy in services (CNVS & MIM). Several stakeholders felt that MR TMA services overlapped with either other Missoula area senior and disabled services or outreach service provided by Missoula-In-Motion. While this may be a misperception (CNVS service is designed to fill gaps in Missoula area senior and disabled transportation services and MR TMA coordinates with Missoula-In-Motion to prevent program overlap), it appears to be a common one. It is important to make apparent the difference in the mission and programs operated by Missoula – In-Motion and MR TMA (they may be obvious internally, but is not always externally).

- Several stakeholders felt that school outreach should not be a goal for MR TMA, as it does not contribute directly to intercity commuter trip reduction. Stakeholders did not question the importance of school outreach/education, simply whether it fell within MR TMA's defined mission.

4. **MR TMA needs to define whom its target groups are and diversify local funding base to meet the identified needs of those groups.**

   - MR TMA needs a more diverse and sustainable funding base. Numerous stakeholders indicated that the development of new and on-going funding sources should be a key priority for MR TMA Board of Directors.

   - Need to clearly define membership (who do we represent?) and seek local funding. Several stakeholders indicated that they thought the TMA should be working to gain the support of the local business community and increasing funding for employer-specific vanpool programs through business membership.

   - MR TMA should focus on providing alternatives for intercity trips in Missoula, Ravalli and Lake counties. A number of stakeholder felt that the TMA should be focused on reducing vehicle miles traveled for intercity trips to and from Missoula.

   - Any overlap in programs threatens funding. At least one stakeholder indicated that they were concerned about CNVS competing for local funding that has traditionally gone to other senior and/or disabled service providers.

Attachment E:

Identified Service Gaps

Based on our conversations with MR TMA staff, interviews with stakeholder groups throughout the community, the general public questionnaire and feedback from the MR TMA Board of Directors, we have developed a list of identified service gaps and needs. The issues presented in the following tables are those that we heard repeatedly and from multiple sources. This is not meant to be an inclusive list, but does identify key areas that need to be addressed in the development of the MR TMA Five-Year Strategic Work Plan.

Identified Service Gaps & Needs

Service Gap/Need	Who Needs it?	When and How Much?
Establish on-going funding base	The Montana Highway Department has approved on-going CMAQ (current source) funds for MR TMA outreach programs. This does not include vanpool or CNVS operational funding	MR TMA is currently working with MDT and the FTA to establish permanent funding for vanpool and CNVS operations. The TMA may be eligible for FTA Section 5311 operating funds.
More vanpools to meet current demand inbound to Missoula	UMT and Smurfit Stone have indicated sufficient demand among existing employees to support new vanpools. Demand is primarily in the Highway 93 corridor (north and south) MR TMA currently has two vans available for new vanpools and will be receiving three new vanpool vehicles before 2006.	Vanpool participant waiting lists vary seasonally. Many commuters prefer to use vanpools in the winter to avoid driving in the winter weather. MR TMA attempt to place as many interested commuters in existing vanpools as possible.
Daytime travel needs for vanpool customers such as Mountain Line transit pass	Vanpoolers	MR TMA vanpool participant survey indicated that this is not a high priority for current vanpoolers
Senior and Disabled transportation coordination in Ravalli County	Seniors and adults with disabilities in Ravalli County	Stakeholders indicated that there is a need for a part to full time coordinator to coordinate (maximize efficiency of) senior and disabled transportation services in Ravalli County. MR TMA is currently working with the Ravalli County TAC on these issues.
General public service between Bitterroot Valley and Missoula	Residents of the Bitterroot Valley commuting or traveling to Missoula for medical appointments	The US 93 Corridor Transportation Planning Assistance Study recommends 3 round trips at

	or to shop. Two major barriers are: (1) Public Service Commission Authority (2) funding availability.	during the AM peak and 3 round trips during the PM peak.
Senior and disabled transportation service between Bitterroot Valley and Missoula	Stakeholders working with senior and disabled residents indicate that there is a high level of need among the senior and disabled communities in the Bitterroot.	Affordability of transportation is a major issue for senior and disabled people traveling from the Bitterroot to Missoula, as taxi services are the only available general public transportation.

Attachment F: Identified Organizational Issues

Based on our conversations with MR TMA staff, interviews with stakeholder groups throughout the community, the general public questionnaire and feedback from the MR TMA Board of Directors, we have developed a list of identified service gaps and needs. The issues presented in the following tables are those that we heard repeatedly and from multiple sources. This is not meant to be an inclusive list, but does identify key areas that need to be addressed in the development of the MR TMA Five-Year Strategic Work Plan.

Figure 17 Identified Organizational/Management Issues & Opportunities

Issues/Opportunities	Description	Impacts
Board Education	Need for ongoing education about MR TMA activities and state of industry/ best practices	Improved awareness of TMA functions and potential among Board members will lead to more active and constructive Board participation
Board Roles and Responsibilities	Largely new membership on Board of Directors. Roles and responsibilities are not clearly defined	A strong and detailed strategic work plan is needed to define Board responsibilities to specific programs and action items to be overseen by Board members or committees
Need for TMA to participate (lead) in legislative activities	MR TMA is seen by many as the organization that should be taking a leading role in state transportation policy development	Promote TDM legislation and ensure funding for SOV reduction and alternative modes
Perception that vanpools and intercity vehicle trip reduction is core mission	Most stakeholders with whom we spoke perceive regional vehicle trip reduction as MR TMA's primary mission.	Several stakeholders, including other local and regional transportation agencies/organizations, are concerned that MR TMA programs outside this core mission are duplicative.

Issues/Opportunities	Description	Impacts
Evaluation and Monitoring of Services & Programs	Not all MR TMA program activities are tied to clear and traceable standards.	By defining clear goals and related performance standards/benchmarks, MR TMA can justify program activities based on operational success.
Need for clarity and visibility in leadership roles	Several stakeholders expressed confusion over leadership roles at MR TMA	Ambiguity or confusion over leadership roles weakens the TMA's effectiveness as a regional leader in TDM and alternative modes advocacy
More effective, better coordinated carpool program	Survey shows low level of knowledge about carpool/ride match program. UMT has developed its own uncoordinated ride matching program	Successful regional ride match programs require extensive coordination. Leadership by MR TMA or another organization is needed to provide a successful regional ride matching program.
Actual and/or perceived overlap of MR TMA programs with other organizations	Several stakeholders perceive that MR TMA programs overlap with those of Missoula in Motion and/or other local senior and disabled service providers	Concern about efficient use of public funds and competition of senior and disabled operating dollars
Response to potential customers inquiries perceived as inadequate	Stakeholders indicated that potential vanpool users had received poor customer service from MR TMA	Discourages potential customers from using MR TMA services. This may be due in part to MR TMA's inability to handle program demand
Expectation that MR TMA will take a lead role (fund, house and direct transportation coordinator) in promoting rural coordination in Ravalli and other counties	Stakeholders in Ravalli County felt that MR TMA's role as lead agency on transportation coordination in the County should be strengthened and include a full time Ravalli County coordinator	Development of improved senior and disabled transportation services in Ravalli County through resource coordination. The use of MR TMA's reverse commute van by the Senior Center is a good example of success in this area.

Issues/Opportunities	Description	Impacts
Need to diversity funding sources or establish stable ongoing funding	CMAQ funds for the operation of MR TMA's Vanpool program are set to expire next year.	Diverse funding support provides increased organizational stability and could lead to increased services if existing sources are maintained
Better Public Information and Advertising/ Distinctive Product	This concern ties into the perception that MR TMA should focus on providing one or two key "products" or program and invest more effort in public information and name recognition	The adoption of the I-Ride logo on Vanpool vehicles is a positive step toward branding MR TMA Vanpool services. Lack of resources to expand certain services/programs may be holding MR TMA back from furthering marketing and outreach efforts.

Attachment G:
MR TMA Marketing Plan

The following is a copy of the 2003-2004 Draft Marketing Plan/Advertising Budget developed by MR TMA staff in August 2003.

Advertising Budget

Month/Year: quarterly evaluation will be conducted through the period to analyze effectiveness of each media.

Total Advertising Budget for 2003-2004:

Promotion runs August – April THEME: cost effectiveness & ecological

Dollar Amount $16,450

Medium	Specific Outlet (Name of Specific Newspaper or Magazine, etc.)	Frequency of Ads	Total Annual Cost	Percent of Total Annual Budget
Newspaper	Getting Ahead – Vanpooler of the Month Press Releases	Once per month	Free	0%
Cable Television	CNN - reaches hard to reach Prime time viewers/61% adults 25-54 Discovery – High concentration of 18-49 demographic MTV – UM viewers Nick at Night – Upscale adults 25-54 incomes $41,000	4 per day (one for one match)M – F 6 a.m. – 8 a.m. and 6 p.m. – 11 p.m.	$3,960	24%
Television	Local Morning shows	Once per quarter	Free	0%
Radio	Most effective to "catch" target audience in trafffic congestion First Sunday – local non-profit program	4 per day – drive times M-F annually	$10,440 Free	63% 0%
Internet	10 pages: ride share application, vanpooling, carpooling, About us, Guaranteed Ride Home, Accomplishments, School Outreach, CNVS, Commute Calculator, FAQs	N/A	$1,450	9%
Misc. Promotions	Rider Recruitment contests/ incentives Fliers/Newsletter How'd you Hear About Us survey		$600	3%